

Insight Enterprise

Filters allow users to specify criteria and receive a listing of applicants who meet the specified criteria. Criteria used for filtering can consist of basic filter criteria from the standard application questions, agency-wide questions, job specific supplemental questions, application received date, online/paper application, notification preference, or score)

Some examples of how filters that you might want to create include:

- Applicants who speak Spanish
- Applicants who are willing to work nights and weekends
- Applicants who are willing to work at a specific facility or geographical region
- Applicants who applied during a specified time frame
- Applicants who scored between 60% – 70% on the written exam

Filtering applicants on the Eligible List

Steps to Create and Apply an Eligible List Filter:

1. Access MyHR
2. Select 'Eligible' from the 'List' dropdown menu
3. The list of active Eligible lists is displayed
4. Click on the 'View Candidates' link to display the names on the eligible list for that recruitment
5. Select 'Filter Candidates' from the 'Select Action' dropdown menu
6. Select 'All Candidates' from the 'Select Candidate(s)' dropdown menu
7. Click the 'Go' button

Zookeeper: Zookeeper Eligible List

[View Exam Plan](#) [Show Evaluation Steps](#) [Show Ranks Sequentially](#) [Show Referrals](#)

[Include Active Candidates Only](#)

Primary Sort: Total Rank Ascending

Secondary Sort: Name Ascending Sort

7 candidates on list.

Name	Person ID	Total Rank	Total Score	Exam Rank	Exam Score	Banded Rank	Date Eligible	Days Svc	Email Notify	Waivers Used	Status	Expires
<input type="checkbox"/> Cline, Bryce	153623	1	100.00	1	100.00	1	04/06/06				Active	10/04/06
<input type="checkbox"/> Lee, Lisa	152909	1	100.00	1	100.00	1	04/06/06		•		Active	10/04/06
<input type="checkbox"/> Lopez, David	156841	3	88.33	3	83.33	2	04/06/06		•		Active	10/04/06
<input type="checkbox"/> Letourneau, Scott	28038	4	83.33	3	83.33	2	04/06/06		•		Active	10/04/06
<input type="checkbox"/> Hansen, Melissa	154490	5	80.00	5	75.00	2	04/06/06		•		Active	10/04/06
<input type="checkbox"/> Marley, Jill	154964	6	66.67	6	66.67	4	04/06/06		•		Active	10/04/06
<input type="checkbox"/> Reyggers, Cindi	154593	6	66.67	6	66.67	4	04/06/06		•		Active	10/04/06

Select Action: == Select ==

Select Candidate(s): == Select == Go

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8. Select the criteria you wish to filter on. If multiple criteria is selected, Insight will filter based on **all** criteria selected, i.e. criteria 1 AND criteria 2, etc.

Candidate	Person ID	Status
Hansen, Melissa	154490	Active
Lee, Lisa	152909	Active
Cline, Bryce	153623	Active
Reygiers, Cindi	154593	Active
Letourneau, Scott	28038	Active
Marley, Jill	154964	Active
Lopez, David	156841	Active

Basic Filter			
Job Type	Work Type	Shift Type	Languages
<input type="checkbox"/> Regular <input type="checkbox"/> Temporary <input type="checkbox"/> Seasonal <input type="checkbox"/> Internship	<input type="checkbox"/> Full Time <input type="checkbox"/> Part Time <input type="checkbox"/> Per Diem	<input type="checkbox"/> Day <input type="checkbox"/> Evening <input type="checkbox"/> Night <input type="checkbox"/> Rotating <input type="checkbox"/> Weekends <input type="checkbox"/> On Call (as needed)	<input type="checkbox"/> American Sign <input type="checkbox"/> Arabic <input type="checkbox"/> Chinese <input type="checkbox"/> French <input type="checkbox"/> German <input type="checkbox"/> Hindi <input type="checkbox"/> Hmong <input type="checkbox"/> Italian <input type="checkbox"/> Japanese <input type="checkbox"/> Korean <input type="checkbox"/> Laos <input type="checkbox"/> Mien <input type="checkbox"/> Other <input type="checkbox"/> Persian <input type="checkbox"/> Portuguese <input type="checkbox"/> Russian <input type="checkbox"/> Spanish <input type="checkbox"/> Tagalog <input type="checkbox"/> Thai

Optional Filter	
Professional License Type	<input type="text"/>
Typing Speed	<input type="text"/> ~ <input type="text"/> WPM
Agency Wide Question Filter	
Gender:	<input type="checkbox"/> Male <input type="checkbox"/> Female
Ethnicity	<input type="checkbox"/> White <input type="checkbox"/> Black <input type="checkbox"/> Hispanic <input type="checkbox"/> Asian/Pacific Islander <input type="checkbox"/> American Indian/Alaskan Native
Are you currently employed by the City of Metropolis?	<input type="checkbox"/> Yes <input type="checkbox"/> No
How did you learn about this job opening?	<input type="checkbox"/> City Website <input type="checkbox"/> Metropolis Times <input type="checkbox"/> City Employee
Have you ever been convicted of a felony?	<input type="checkbox"/> Yes <input type="checkbox"/> No
What age group do you belong to:	<input type="checkbox"/> Under 18 <input type="checkbox"/> 18 - 20 <input type="checkbox"/> 21 - 39 <input type="checkbox"/> 40 or older
Are you related to anyone who works for the City of Metropolis?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Job Specific Filter	
Do you have a high school diploma or G.E.D.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Do you have a valid California driver's license?	<input type="checkbox"/> Yes <input type="checkbox"/> No
How many years experience do you have working with animals?	<input type="checkbox"/> 0 <input type="checkbox"/> 2 <input type="checkbox"/> 4 <input type="checkbox"/> 6
Which types of animals have you cared for? (Check all that apply.)	<input type="checkbox"/> Lions <input type="checkbox"/> Tigers <input checked="" type="checkbox"/> Bears <input type="checkbox"/> None of the above
<input type="button" value="Filter Now"/> <input type="button" value="Cancel"/>	

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9. Insight returns a list of the applicants who meet the specified criteria:

Filter returned 3 records.

Name	Person ID	Total Rank	Total Score	Exam Rank	Exam Score	Banded Rank	Date Eligible	Days Svc	Email Notify	Waivers Used	Status	Expires
<input type="checkbox"/> Cline, Bryce	153623	1	100.00	1	100.00	1	04/06/06				Active	10/04/06
<input type="checkbox"/> Lee, Lisa	152909	1	100.00	1	100.00	1	04/06/06		•		Active	10/04/06
<input type="checkbox"/> Letourneau, Scott	28038	4	83.33	3	83.33	2	04/06/06		•		Active	10/04/06

Select Action

Select Candidate(s)

Go

10. Applicants are displayed in ranked order according to those who meet the filtered criteria. Applicants now can be referred to requisitions as necessary.

Filtering applicants in the Evaluation Steps

Filters on evaluation steps differ from filters on the eligible list in that evaluation step filters can be saved and used again with the exam plan they were created from, or on an evaluation step in another exam plan. Filter criteria based on job-specific supplemental questions will only be used within the applicable exam plan. Job-specific criteria in a filter will be ignored if the filter is used in another exam plan. Filters on evaluation steps allow for the use of both 'And' and 'Or' operators between the criteria.

When selecting 'Filter Candidates' from the 'View Applicants by Step' page, you will be taken to the 'Filter Applicants' page. If you have already created and saved one or more filters, they will appear in a drop-down box on the Filter Applicants page, with selections in the drop-down appearing in red if those filters were created from an exam plan other than the one with which you are currently working, and selections appear in black if those filters were created from the exam plan that you are currently in. Selections in black appear before selections in red, and are sub-sorted alphabetically.

If you have one or more saved filters, you will also see buttons for 'Apply Filter' and 'View/Edit Filter.' 'Apply Filter' applies the filter to the candidates chosen in the current evaluation step; 'View/Edit Filter' allows you to view and/or edit the filter you have chosen before applying it. There is also a link at the bottom labeled 'Create New Filter' that allows you to create a brand new filter.

Filters are composed of one or more entities called filter groups. A filter group is a way of grouping individual filter criteria that share the same 'And/Or' criteria. Filters can contain both 'AND' and 'OR' logic. Any number of filter groups can be created within a group type. Each filter group can have either an 'AND' or 'OR' group type.

In addition to group types, which define how criteria within a filter group are joined together, the rules for how each filter group is joined to its adjacent filter group must also be defined. Therefore, for every filter group created, either an 'AND' or 'OR' operator must be selected to join the group to the previous group.

Exam Plan: M0020 - AIRPORT OPERATIONS SPECIALIST II (OPEN & PROMOTIONAL)
 View Applicants By Step
 Filter Name: Date Received > 7/15/03

Group 1
 Group Type: AND
 DELETE Date Received > 7/11/03 AND
 DELETE Step Percent Score > 57.14

* Filter Name: Date Received > 7/15/03
 Add Group: Group Type: <...> Join to Previous Group Using: <...>

Basic Criteria

Date Received	<...>	Add to Group	Group 1
Source	<input type="checkbox"/> Online <input type="checkbox"/> Paper	Add to Group	Group 1
Notification Type	<input type="checkbox"/> Email <input type="checkbox"/> Paper	Add to Group	Group 1
Step Raw Score	<...>	Add to Group	Group 1
Step Percentage Score	<...>	Add to Group	Group 1
Job Type	<input type="checkbox"/> Regular <input type="checkbox"/> Temporary <input type="checkbox"/> Seasonal <input type="checkbox"/> Internship	Add to Group	Group 1
Work Type	<input type="checkbox"/> Full Time <input type="checkbox"/> Part Time <input type="checkbox"/> Per Diem	Add to Group	Group 1
Shift Type	<input type="checkbox"/> Day <input type="checkbox"/> Evening <input type="checkbox"/> Night <input type="checkbox"/> Rotating <input type="checkbox"/> Weekends <input type="checkbox"/> On Call (as needed)	Add to Group	Group 1
Languages	<input type="checkbox"/> American Sign <input type="checkbox"/> Arabic <input type="checkbox"/> Chinese <input type="checkbox"/> French <input type="checkbox"/> German <input type="checkbox"/> Hindi <input type="checkbox"/> Hmong <input type="checkbox"/> Italian <input type="checkbox"/> Japanese <input type="checkbox"/> Korean <input type="checkbox"/> Laos <input type="checkbox"/> Mien <input type="checkbox"/> Other <input type="checkbox"/> Persian <input type="checkbox"/> Portuguese <input type="checkbox"/> Russian <input type="checkbox"/> Spanish <input type="checkbox"/> Tagalog <input type="checkbox"/> Thai <input type="checkbox"/> Vietnamese	Add to Group	Group 1
License Type		Add to Group	Group 1

At the top of the Applicant Step Filter page is a diagram of the filter groups for that filter, which depicts the various filter groups, criteria within each group, and how each filter group is joined to its adjacent filter group.

Below the filter group diagram is an area where the filter name is defined, and below that is an area that allows you to add a new filter group (you will need to select the group type and how that group is to be joined to the previous group).

Following that is an area that allows you to select from a variety of basic filter criteria, including some basic application information, such as the date the application was received, profile information, such as job/shift/work type preferences, and step score information.

Below the basic criteria is Agency-Wide Question criteria, which allows you to select criteria based on the applicant's answers to Agency-Wide questions.

Below the Agency-Wide Question criteria is Job-Specific Question criteria, which allows you to select criteria based on the applicant's answers to Job-Specific questions. Note that if you are editing a filter for an exam plan but are currently working in a different exam plan, the job-specific filter section will not be displayed, since it's not applicable.

At the bottom of the Applicant Step Filter page are two buttons. The **'Update Filter'** button allows you to update your filter criteria at any time, as you update filter criteria.

The **'Apply Filter'** button allows you to apply the filter to the candidates you have chosen (note: the 'Apply Filter' button does not appear if you are not currently working with any candidates). A third button appears when creating a new filter. It reads **'Apply and Save Filter'** and this button is used when you want to not only apply your filter, but also make that filter a saved filter – meaning one that can be accessed again after you have applied it. Saved filters, as mentioned before, appear in a drop-down when filtering candidates, which allows you to select that filter again to re-apply it. If you choose the 'Apply Filter' button instead of the 'Apply and Save Filter' button, your filter will be immediately applied to your chosen candidates, but you will never see that filter in any drop-downs at a future date, and therefore you will never be able to re-apply that filter without recreating it.

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Saved filters are saved with the exam plan from which they were created; therefore, when on the Exam Plan Detail page, there is a section named 'Filters,' which allows you to see which filters have been created and saved with that exam plan, and also allows you to create a new filter without having to go through an evaluation step to create one.

The 'Save Step View' button on the 'View Applicants by Step' page does not apply to filters that may have been applied to candidates within that exam plan. It only applies to the expanded/collapsed state of evaluation steps and their comments. In other words, applied filters are not persistent in that they will no longer be applied once the user exits the 'View Applicants by Step' page. For example, if the user chooses to filter candidates and applies a filter, the 'View Applicants by Step' page will show the filtered candidates in the related evaluation step. If the user then chooses all of the filtered candidates and chooses 'Change Disposition' to update the candidates' dispositions, the user is returned to the 'View Applicants by Step' page, and the filter will no longer be applied. This is where saved filters become very useful. They can be reused without having to reenter all of the filter criteria again.

NOTE: Criteria such as job type, work type, and shift type will be compared to the candidate's online application, as opposed to their master profile, when the filter is applied.

Steps to Create and Apply an Evaluation Step Filter:

1. Access MyHR
2. Select the 'Exam Plan' option from the 'CandidateTrack' dropdown menu
3. The Exam Plan screen is displayed



The screenshot shows the 'Add New Exam Plan' interface. At the top, there is a search bar with the text 'Search for exam title or exam number:' and a 'Go' button. Below the search bar, it says '11 records found. Page 1 of 1'. The main content is a table with the following data:

Exam #	Exam Plan	Job Posting	Action
	ACCOUNTANT (TRAINEE)	Create Posting	Edit Delete
EX ACC III	ACCOUNTANT III	Create Posting	Edit Delete
ACCIII	Accountant III	Create Posting	Edit Delete
AA V	ADMIN ASSISTANT V	Create Posting	Edit Delete
CI-I	CONSTR INSPECTOR I	Create Posting	Edit Delete

4. Click on the Exam Plan Title for the applicable exam plan
5. The 'Exam Plan Detail' screen is displayed
6. Click on the Evaluation Steps 'View Applicants by Step' link

Job Posting					
Job #	Job Title	Status	Last Updated	Assigned To	Action
00021	HR Manager	Expired	11/21/05	Michelle Cline	Edit Delete
Recruiting Plan Add New					
Ad Type	Ad Name	Requested Date	Start Date	End Date	Action
Evaluation Steps Add Step View Applicants (9) View Applicants by Step (9) App Flow					
Step	Evaluation Step	Weight	Results	At Step	Action
Step 1	Application Received	N/A	View Results	1	
Step 2	Minimum Qualifications - Auto Scored	0%	View Results	2	Edit Delete
Step 3	T & E - SME Review	30%	View Results	0	Edit Delete
Step 4	Written Exam	30%	View Results	6	Edit Delete
Step 5	Oral Exam/Interview	40%	View Results	0	Edit Delete

7. Choose 'Filter Candidates' from the 'Select Action' drop-down menu
8. Choose candidate(s) from the 'Select Candidate(s)' drop-down menu
9. Click 'Go'

Step 4: Written Exam							
6 records found.							
Step Comments							
Candidate	Person ID	Master Profile	Disposition	Email Notify	Source	Received	Notices
<input type="checkbox"/> Baker, Jonathan	154347	View	Fail - 60.00%		Paper	01/24/05 06:33 PM	N/A
<input type="checkbox"/> Cline, Michelle	100781	View	Fail - 68.00%	*	Online	01/24/05 06:27 PM	N/A
<input type="checkbox"/> Davidovic, Damir	1	View	Pass - 70.00%	*	Online	01/24/05 07:04 PM	N/A
<input type="checkbox"/> Letourneau, Scott	28038	View	Pass - 76.00%	*	Online	01/24/05 04:53 PM	N/A
<input type="checkbox"/> Pearson, Melissa	154346	View	Pass - 80.00%		Paper	01/24/05 06:31 PM	N/A
<input type="checkbox"/> Wilson, Janet	154363	View	Pass - 84.00%		Paper	01/27/05 10:40 AM	N/A
Select Action: <input type="text" value="Filter Candidates"/> Select Candidate(s): <input type="text" value="All"/> <input type="button" value="Go"/>							

10. Click 'Create New Filter'

Exam Plan	00021 - HR Manager
Evaluation Step	Written Exam
	View Applicants By Step
Candidates Selected	6 Show Candidates

You currently have no saved filters to apply.

[Create New Filter](#)

11. The 'Applicant Step Filter' page is displayed:

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Exam Plan: 00021 - HR Manager
Evaluation Step: Written Exam
View Applicants By Step

Group 1
Group Type: AND

* Filter Name:

Add Group: Group Type: <...> Join to Previous Group Using: <...>

Basic Criteria

Date Received	<...>	Add to Group	Group 1
Source	<input type="checkbox"/> Online <input type="checkbox"/> Paper	Add to Group	Group 1
Notification Type	<input type="checkbox"/> Email <input type="checkbox"/> Paper	Add to Group	Group 1
Step Raw Score	<...>	Add to Group	Group 1
Step Percentage Score	<...>	Add to Group	Group 1
Job Type	<input type="checkbox"/> Regular <input type="checkbox"/> Temporary <input type="checkbox"/> Seasonal <input type="checkbox"/> Internship	Add to Group	Group 1
Work Type	<input type="checkbox"/> Full Time <input type="checkbox"/> Part Time <input type="checkbox"/> Per Diem	Add to Group	Group 1
Shift Type	<input type="checkbox"/> Day <input type="checkbox"/> Evening <input type="checkbox"/> Night <input type="checkbox"/> Rotating <input type="checkbox"/> Weekends <input type="checkbox"/> On Call (as needed)	Add to Group	Group 1
Languages	<input type="checkbox"/> American Sign <input type="checkbox"/> Arabic <input type="checkbox"/> Chinese <input type="checkbox"/> French <input type="checkbox"/> German <input type="checkbox"/> Hindi <input type="checkbox"/> Hmong <input type="checkbox"/> Italian <input type="checkbox"/> Japanese <input type="checkbox"/> Korean <input type="checkbox"/> Laos <input type="checkbox"/> Mien <input type="checkbox"/> Other <input type="checkbox"/> Persian <input type="checkbox"/> Portuguese <input type="checkbox"/> Russian <input type="checkbox"/> Spanish <input type="checkbox"/> Tagalog <input type="checkbox"/> Thai <input type="checkbox"/> Vietnamese	Add to Group	Group 1
License Type	<input type="text"/>	Add to Group	Group 1
Typing WPM	<...>	Add to Group	Group 1

12. Enter the 'Filter Name': enter a name that describes the criteria you are filtering on
13. Enter the desired criteria and indicate the filter group that the criteria should be assigned to in the 'Add to Group' drop down list.
14. To add another filter group, in the 'Add Group' section, specify the applicable 'And/Or' operator in the 'Group Type' and indicate the appropriate 'And/Or' operator to use to join the new group to the previous group
15. Select the 'Apply and Save Filter' button at the bottom of the page
16. You will be returned to the 'View Applicants by Step' page and can see the filtered list of applicants within the step that you filtered:

Step 5: Oral Exam/Interview
3 records found. THIS STEP IS FILTERED. [View Filter](#) [Unfilter](#) [Step Comments](#)

Candidate	Person ID	Master Profile	Disposition	Email Notify	Source	Received	Notices
<input type="checkbox"/> Cline, Michelle	100781	View	N/A	*	Online	01/24/05 06:27 PM	N/A
<input type="checkbox"/> Davidovic, Damir	1	View	N/A	*	Online	01/24/05 07:04 PM	N/A
<input type="checkbox"/> Letourneau, Scott	28038	View	N/A	*	Online	01/24/05 04:53 PM	N/A

Select Action: == Select ==

Select Candidate(s): == Select ==

[Go](#)